

## This schedule applies to: Office of the Superintendent of Public Instruction

### Scope of records retention schedule

This records retention schedule authorizes the destruction/transfer of the public records of the Office of the Superintendent of Public Instruction relating to the unique functions of overseeing K-12 public education, working with school districts to administer basic education program and implement education reform. The schedule is to be used in conjunction with the *State Government General Records Retention Schedule (SGGRRS)* which authorizes the destruction/transfer of public records common to all state agencies.

### Disposition of public records

Public records covered by records series within this records retention schedule (regardless of format) must be retained for the minimum retention period as specified in this schedule. Washington State Archives strongly recommends the disposition of public records at the end of their minimum retention period for the efficient and effective management of state resources.

Public records designation as “Archival (Permanent Retention)” must not be destroyed. Records designated as “Archival (Appraisal Required)” must be appraised by the Washington State Archives before disposition. Public records must not be destroyed if they are subject to ongoing or reasonably anticipated litigation. Such public records must be managed in accordance with the agency’s policies and procedures for legal holds. Public records must not be destroyed if they are subject to an existing public records request in accordance with chapter 42.56 RCW. Such public records must be managed in accordance with the agency’s policies and procedures for public records requests.

### Revocation of previously issued records retention schedules

All previously issued records retention schedules to the Office of the Superintendent of Public Instruction are revoked. The Office of the Superintendent of Public Instruction must ensure that the retention and disposition of public records is in accordance with current, approved records retention schedules.

### Authority

This records retention schedule was approved by the State Records Committee in accordance with RCW 40.14.050 on September 2, 2015.

*Signature on File*

**For the State Auditor:**  
Cindy Evans

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**For the Attorney General:**  
Isaac Williamson

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**For the Office of Financial Management:**  
Shane Hamlin

*Signature on File*

**The State Archivist:**  
Steve Excell

## REVISION HISTORY

Version	Date of Approval	Extent of Revision
1.0	September 5, 2012	Consolidation of all existing disposition authorities (with major revisions to Apportionments and some other minor revisions).
1.1	December 5, 2012	Minor revisions to Equity and Civil Rights and School Financial Services sections.
1.2	September 18, 2013	Added five (5) new record series, consolidated and updated Assessments and Child Nutrition sections.
1.3	September 3, 2014	Added (2) more series, minor revisions to Development Sets – Grades K-12, consolidation and revisions to Administrative Resources and Office of Professional Practices.
1.4	September 2, 2015	Major revision to Professional Certification section and minor revision to Assessment and Student Information section.

For assistance and advice in applying this records retention schedule,  
please contact the Office of the Superintendent of Public Instruction's Records Officer  
or Washington State Archives at:  
[recordsmanagement@sos.wa.gov](mailto:recordsmanagement@sos.wa.gov)

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## 1. ASSESSMENT AND STUDENT INFORMATION

This section covers records relating to the development, selection and implementation of state and federally required assessments, including reports on achievement for students, schools, districts and the state.

### 1.1 ASSESSMENT AND RESEARCH – Office 571

*This program works with records relating to the development of all state assessments.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
74-02-03430 Rev. 1	<p><b>Assessment Research</b></p> <p>Records relating to research projects for the development of state student assessments. Includes both internal and external projects, either contractual or non-contractual.</p> <p>Includes, but it not limited to:</p> <ul style="list-style-type: none"> <li>• Project proposals;</li> <li>• Progress reports;</li> <li>• Final Reports.</li> </ul> <p><i>Note: Signed contracts and agreements for work are covered under Contracts and Agreements GS 01050 and financial transactions related on execution of contract will be covered under fiscal and accounting records.</i></p>	<p><b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.</p>	<p><b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR</p>
68-09-00781 Rev. 1	<p><b>Inactive Research Proposals (Rejected)</b></p> <p>Records relating to internal and external assessment research projects that were rejected for consideration.</p>	<p><b>Retain</b> for 3 years after end of fiscal year <i>then</i> <b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OFM</p>

## 1.2 ASSESSMENT AND STUDENT INFORMATION – Office 530

*This program works with records relating to the development, administration, and achievement data of all state assessments.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
94-02-52854 Rev. 2	<p><b>Accreditation Files</b></p> <p>Records relating to the accreditation of state schools.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>School improvement plans;</li> <li>Visiting teams reports;</li> <li>Three year follow up information.</li> </ul>	<p><b>Retain</b> for 7 years after end of school year</p> <p><i>then</i></p> <p><b>Transfer</b> to Washington State Archives for permanent retention.</p>	<p><b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR</p>
84-02-34802 Rev. 2	<p><b>Achievement and Assessment Data Files</b></p> <p>Records relating to historical data to assist in refining instructional practices and curriculum.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>Self study reports;</li> <li>State and district level summaries.</li> </ul>	<p><b>Retain</b> for 6 years after end of fiscal year</p> <p><i>then</i></p> <p><b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OFM</p>

## 1.2 ASSESSMENT AND STUDENT INFORMATION – Office 530

*This program works with records relating to the development, administration, and achievement data of all state assessments.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
10-05-62178 Rev. 2	<p><b>Development and Scoring Sets – Grades K-12</b></p> <p>Records related the development of state student academic assessments and testing. Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Item writing and review materials;</li> <li>• Practice, anchor and qualification sets;</li> <li>• Pilot and operational range findings;</li> <li>• Notes and evaluations;</li> <li>• Specific scoring rubrics, score points and annotations;</li> <li>• Statistical information.</li> </ul> <p>Excludes actual scores covered by State Academic Assessment Scores (DAN 06-04-61146).</p>	<p><b>Retain</b> for 25 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.</p>	<p><b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM</p>
77-12-20258 Rev. 2	<p><b>Historical Statistical Enrollment Data</b></p> <p>Provides a record of statistical enrollment and staff data on public and private schools. Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Course enrollments;</li> <li>• Graduate and dropout statistics;</li> <li>• Minority enrollment;</li> <li>• Staffing statistics.</li> </ul>	<p><b>Retain</b> for 50 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.</p>	<p><b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM</p>

## 1.2 ASSESSMENT AND STUDENT INFORMATION – Office 530

*This program works with records relating to the development, administration, and achievement data of all state assessments.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
10-05-62177 Rev. 2	<p><b>Released Items – Grades K-12</b></p> <p>Records relating to items released for instructional use and guidance once test has been developed and administered.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Specific scoring rubrics;</li> <li>• Sample scenarios and materials;</li> <li>• Anchor papers and sets;</li> <li>• Student work at representative score points;</li> <li>• Annotations for scores.</li> </ul>	<p><b>Retain</b> for 10 years after end of calendar year <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM
94-02-52883 Rev. 1	<p><b>School Achievement Recognition</b></p> <p>Records relating to the applications, recommendations and selection of state schools to be nationally recognized for performance achievements.</p>	<p><b>Retain</b> for 4 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.</p>	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM
06-04-61146 Rev. 1	<p><b>State Academic Assessment Scores</b></p> <p>Student score files generated by the testing contractor as compiled from student responses in standardized assessment test booklets.</p>	<p><b>Retain</b> for 8 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.</p>	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR



## 1.2 ASSESSMENT AND STUDENT INFORMATION – Office 530

*This program works with records relating to the development, administration, and achievement data of all state assessments.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
15-09-68821 Rev. 0	<p><b>State Academic Assessment – Alternative</b></p> <p>Records relating to requests and progress towards a Certificate of Academic Achievement (CAA) or a Certificate of Individual Achievement (CIA) as an alternative assessment enabling student to meet the standards for the minimum set of skills required for graduation.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Student applications and registrations;</li> <li>• Score files and changes;</li> <li>• Requests for appeals or retroactive changes to scores or levels;</li> <li>• Reports of any discrepancies;</li> <li>• Conclusions and decisions of any appeals or requests for changes.</li> </ul> <p>Reference: <a href="#">RCW 28A.655.061</a></p>	<p><b>Retain</b> for 5 years after graduation <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM
10-05-62175 Rev. 1	<p><b>Student Test Booklets (Blank) – Grades K-12</b></p> <p>Blank test booklets for standardized student assessment tests for grades K through 12.</p>	<p><b>Retain</b> for 25 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.</p>	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR

## 1.2 ASSESSMENT AND STUDENT INFORMATION – Office 530

*This program works with records relating to the development, administration, and achievement data of all state assessments.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
06-04-61144 Rev. 0	<b>Student Test Booklets – Grades 3-8</b> Student test booklets, Measurements of Student Progress (MSP) for grades 3-8.	<b>Retain</b> for 1 year after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
06-04-61145 Rev. 0	<b>Student Test Booklets – HS Grades 9-12</b> Student test booklets High School Proficiency Exam (HSPE) for grades 9-12.	<b>Retain</b> for 2 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
13-09-68459 Rev. 0	<b>Test Result Requests</b> Records relating to a parental, guardian or school district requests for test results or requests for modifications to test result or levels related to a student's required standardized assessment or other required measurement testing. Includes, but is not limited to: <ul style="list-style-type: none"> <li>• Results requests;</li> <li>• Requests for appeals or retroactive changes to scores or levels;</li> <li>• Reports of any discrepancies;</li> <li>• Conclusions and decisions of any appeals or requests for changes.</li> </ul> Excludes actual test scores covered by State Academic Assessment Scores (DAN 06-04-61146).	<b>Retain</b> for 3 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 2. CAREER AND COLLEGE READINESS

This section covers records relating to the Career and Technical Education program and Secondary Education.

2.1 CAREER AND TECHNICAL EDUCATION – Office 330			
<i>This section covers records relating to Career and Technical Education programs that lead to industry certification, apprenticeships, and college degrees.</i>			
DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-05-22521 Rev. 1	<b><i>Agriculture and Science Education Staff Visit Reports – Office Form 3</i></b> Maintains a record of staff visits performed by State Agriculture Supervisors to high school, vocational-technical institutes, and skill centers.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
00-10-59934 Rev. 0	<b><i>Agriculture Education and Future Farmers of America (FFA) Administrative Subject Files</i></b> Provides documentation pertaining to operation of agency activities including FFA national convention, state officers, minutes, news releases, newsletters, awards, contest results.	<b>Retain</b> for 4 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM
79-05-22515 Rev. 1	<b><i>Business and Marketing Organizations Files</i></b> Maintains communications with various organizations concerning meetings, agendas and programs.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.	<b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM

## 2.1 CAREER AND TECHNICAL EDUCATION – Office 330

*This section covers records relating to Career and Technical Education programs that lead to industry certification, apprenticeships, and college degrees.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-05-22514 Rev. 2	<b><i>Business and Marketing School District Program Files</i></b> Maintains communication with various organizations concerning meetings, agendas and programs.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.	<b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM
79-05-22520 Rev. 1	<b><i>Career and Technical Education District Programs</i></b> Maintains a record of financial transactions, operation of programs, requests for supplies and forms, program approvals, district correspondence, monitoring results and federal Carl Perkins funding to include all vocational programs such as Business and Marketing Pathway, Health and Human Services, Technology and Industry, Agriculture and Science Pathway.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-07-22952 Rev. 1	<b><i>Family, Career and Community Leaders of America Meetings and Affiliations Files</i></b> Maintains record of national, state and regional Family, Career, and Community Leaders of America meetings; maintains records of reciprocal actions between other organizations.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 2.1 CAREER AND TECHNICAL EDUCATION – Office 330

*This section covers records relating to Career and Technical Education programs that lead to industry certification, apprenticeships, and college degrees.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-07-22953 Rev. 1	<b><i>Family, Career and Community Leaders of America Meetings and Affiliations Files</i></b> Maintains records of national, state and regional Future Homemakers of America meetings; maintains record of reciprocal actions between other organizations.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.	<b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM
79-07-22951 Rev. 1	<b><i>Family, Career, and Community Leaders of America Program of Work Activities Files</i></b> Maintains a record of state, regional and national Family, Career, and Community Leaders of America organizations and programs.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.	<b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM
79-07-22955 Rev. 1	<b><i>Family and Consumer Sciences Education Food Education and Service Training Films</i></b> Maintains record of workshops, teacher training and programs related to food service training.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-07-22958 Rev. 1	<b><i>Family and Consumer Sciences Education Extended Learning Files</i></b> Record of out-of-class learning experiences of students and conferences with parents and a record of contracted extended time.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 2.1 CAREER AND TECHNICAL EDUCATION – Office 330

*This section covers records relating to Career and Technical Education programs that lead to industry certification, apprenticeships, and college degrees.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-07-22961 Rev. 1	<b><i>Family and Consumer Sciences Education Special Project Files</i></b> Maintain record of special projects, evaluations, costs of projects.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-07-22960 Rev. 2	<b><i>Family and Consumer Sciences Education Teachers Coordinating Council and Inservice Education</i></b> Maintain record of program of work, meetings, and materials developed-conducted by Home and Family Life Education.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-07-22959 Rev. 1	<b><i>Family and Consumer Sciences Education Teachers End of Year and Summary Reports</i></b> Record of yearly activities reports submitted by teachers; record of teacher's accomplishments in specific area of curriculum.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-07-22956 Rev. 1	<b><i>Family and Consumer Sciences Education Teacher Training Files</i></b> Maintain record of memoranda of agreement, supervisory services, and courses offered.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 2.1 CAREER AND TECHNICAL EDUCATION – Office 330

*This section covers records relating to Career and Technical Education programs that lead to industry certification, apprenticeships, and college degrees.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-05-22516 Rev. 1	<b><i>Future Business Leaders of America – Phi Beta Lambda Files</i></b> Maintains record of activities Future Business Leaders of America – Phi Beta Lambda and its relationship to Business and Marketing Education.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM
79-05-22510 Rev. 1	<b><i>Marketing Education and Diversified Occupation School District Correspondence Files</i></b> Maintains correspondence on Marketing Education and Diversified Occupation Programs, Instructional Management of Health and Safety Tests, New Distributive Education and Diversified Occupation approved program contractual information.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.	<b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM
79-05-22511 Rev. 1	<b><i>Marketing Education Conference and Workshop Files</i></b> Maintains agendas and financial and planning data.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 2.1 CAREER AND TECHNICAL EDUCATION – Office 330

*This section covers records relating to Career and Technical Education programs that lead to industry certification, apprenticeships, and college degrees.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
94-02-53374 Rev. 1	<b>Office for Civil Rights Annual Reports Reporting Document and Backup Data</b>	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM
79-05-22503 Rev. 0	<b>Plans for Education Professions Development Act Internship Project</b> Provides correspondence, applications and reports.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-07-22972 Rev. 3	<b>Professional Organizations and Committees as Related to Technology and Industrial Education</b> Maintains correspondence, goals, minutes and agenda regarding meetings and functions of the organizations and committees.	<b>Retain</b> for 5 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM
79-07-22974 Rev. 2	<b>School District Files of Technology and Industrial Education Vocationally Approved Courses</b> Maintains application, course outline, budget, progress reports and related correspondence.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM



## 2.1 CAREER AND TECHNICAL EDUCATION – Office 330

*This section covers records relating to Career and Technical Education programs that lead to industry certification, apprenticeships, and college degrees.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-07-22969 Rev. 3	<b>Trade and Industrial Education School District File</b> Provides documentation of grants issued to school districts pertaining to Technology and Industrial, Technology Education programs. Includes applications, budget, revisions, and reports.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
95-11-56232 Rev. 0	<b>Vocational Equity and Single Parent/Displaced Homemaker Grants</b> Provides grant process information including application, budget applications, budget revisions and all correspondence related to funding and activities of grant process for school districts, community and technical colleges, corrections facilities, and community-based organizations.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-05-22505 Rev. 0	<b>Vocational Education Program Development Activities and Planning Files</b> Provides line-item budget material used for planning.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-05-22517 Rev. 0	<b>Vocational Education Secondary 1083 Printout</b> Provides a record of enrollment in secondary education.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 2.1 CAREER AND TECHNICAL EDUCATION – Office 330

*This section covers records relating to Career and Technical Education programs that lead to industry certification, apprenticeships, and college degrees.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-05-22518 Rev. 1	<b>Vocational Education Statistics 1231 Printout</b> Provides a record of enrollment in Business and Marketing Education classes.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-05-22504 Rev. 0	<b>Vocational Education Summer Conference Files</b> Maintains correspondence and fiscal records for individual service areas and planning materials.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-05-22513 Rev. 1	<b>Washington Marketing Education Clubs of America Correspondence Files</b> Provides chapter membership, summary reports, correspondence, and Diamond Club project.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.	<b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM
79-05-22512 Rev. 1	<b>Washington Marketing Education Clubs of America Financial Records</b> Provides budgets, agreements, and funding documents.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 2.1 CAREER AND TECHNICAL EDUCATION – Office 330

*This section covers records relating to Career and Technical Education programs that lead to industry certification, apprenticeships, and college degrees.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-07-22971 Rev. 3	<b>Washington Technology and Industrial Education Association and Related Councils</b> Maintains correspondence restructure, function and committee assignments of the association; also planning materials for national conferences and steering committee meetings.	<b>Retain</b> for 5 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM
79-07-22970 Rev. 2	<b>Washington Universities and Colleges Technology and Industrial Education Files</b> Provides correspondence to and from colleges regarding Technology and Industrial, Technology Education teacher preparation.	<b>Retain</b> for 5 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

### 3. EXECUTIVE SERVICES

This section covers records relating to the overarching management of agency business and its general administration which are not covered by the *State Government General Records Retention Schedule*.

See *State Government General Records Retention Schedule* for additional records relating to agency management.

#### 3.1 BASIC EDUCATION APPROVAL – Office 540

*This section covers records related to basic education.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-05-22534 Rev. 1	<b><i>Application for Entitlement for Basic Education Allocation Funds</i></b> Provides documentation of assessment of the compliance of public school districts with the requirements of the Basic Education Act.	<b>Retain</b> for 25 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
84-12-34799 Rev. 2	<b><i>Basic Education State Program Allocation Entitlement Requirements Monitoring Reports</i></b> Provides documentation on reports of randomly selected school districts for compliance monitoring regarding Basic Education Act.	<b>Retain</b> for 25 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-05-22535 Rev. 1	<b><i>Waiver of Basic Education Allocation Entitlement Requirements</i></b> Provides documentation submitted by school districts applying for a waiver form compliance with one or more of the Basic Education Act Entitlement Requirements.	<b>Retain</b> for 25 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

### 3.2 PROFESSIONAL EDUCATOR STANDARDS BOARD (PESB) – Office 756

This section covers records related to policies and requirements for the preparation and certification of education professionals.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-07-22942 Rev. 0	<b><i>College, University, and Consortium Professional Education Annual Reports</i></b> Maintain reports filed with Professional Education Section annually by all colleges, universities and consortiums in the state in compliance with State Board of Education rules.	<b>Retain</b> for 5 years after superseded <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.	<b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM
79-07-22941 Rev. 1	<b><i>College, University and Professional Educators Advisory Board (PEAB) Teacher, Administrator, Education Staff Associate Training Program Files</i></b> Maintain documents pertinent to State Board of Education approval of all training programs and site visits to Washington State colleges, universities, and PEABs regarding teachers, administrators and educational staff associates.	<b>Retain</b> for 6 years after end of next site visit <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-07-22946 Rev. 0	<b><i>Educational Service District Inservice Committee Annual Reports</i></b> Maintains reports filed annually with the Professional Education section by the Education Services District In-service committees.	<b>Retain</b> for 5 years after superseded <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.	<b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM

### 3.3 RECOGNITION PROGRAMS – Office 590

This program administers awards programs for educators and schools.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
91-09-48102 Rev. 2	<b><i>Educator Awards Programs</i></b> To acknowledge and award outstanding teachers, principals, administrators, school boards, superintendents, and classified staff statewide. Retain applications of recipients, score results, publications, and administrative information on the selection process and award program. Includes Teacher of the Year, Milken Educator, Presidential Award for Excellence in Mathematics and Science Teaching, Classified Employee Excellence Award, Exceptional Educators.	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
03-11-60582 Rev. 1	<b><i>School Recognition Programs</i></b> Award programs to identify and give public recognition to outstanding public and private schools across Washington. Retain applications of recipients, award criteria, score results, publications, and lists of honorees. Includes Blue Ribbon Schools, Schools of Distinction.	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR

## 4. FINANCIAL RESOURCES

This section covers records relating to the management of K-12 Financial Services and Governmental Relations.

4.1 AGENCY ACCOUNTING – GENERAL – Office 455 <i>This section covers records relating to agency budgeting.</i>			
DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-10-23506 Rev. 0	<b>Accrual Documentation</b> Identifies agency accruals.	<b>Retain</b> for 4 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-10-23499 Rev. 0	<b>Reconciliation – Fund 705 – Suspense (Copy 2)</b> Reconciles general ledger with Office of Financial Management.	<b>Retain</b> for 2 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-07-23032 Rev. 2	<b>School Building Construction Project File</b> Provides a record of authorization and payment of individual construction projects. Forms include B-6 or C-6 authorization to prepare final plan and specifications. B-8 or C-8 approval of revised costs and/or financing of school building project. B-8a or C-8a Contracts; Escrow Agreements. Invoice vouchers for payment to contractors and architects. Related Correspondence.	<b>Retain</b> for 25 years after final payment of contract <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 4.2 FEDERAL FINANCE – Office 460

*This office covers records related to federal funding.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
87-03-39463 Rev. 0	<b><i>Bilingual Education in Elementary and Secondary Schools</i></b> Maintains a record of federal dollar expenditures by grantee for a specific federal program (84.365).	<b>Retain</b> for 6 years after termination of contract <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
87-03-39465 Rev. 1	<b><i>Elementary and Secondary Education Act (ESEA) Migrant Education Program</i></b> Maintains a record of federal dollar expenditures by grantees for a specific federal program (84.011).	<b>Retain</b> for 6 years after termination of contract <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
87-03-39464 Rev. 1	<b><i>Elementary and Secondary Education Act (ESEA) Title I Assistance for Education of the Disadvantaged</i></b> Maintains a record of federal dollar expenditures by grantee for a specific federal program (84.010).	<b>Retain</b> for 6 years after termination of contract <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
87-03-39466 Rev. 1	<b><i>Elementary and Secondary Education Act (ESEA) Title 1 Chapter 1 Assistance for Neglected and Delinquent Children</i></b> Maintains a record of federal dollar expenditures by grantees for a specific federal program (84.013).	<b>Retain</b> for 6 years after termination of contract <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR



## 4.2 FEDERAL FINANCE – Office 460

*This office covers records related to federal funding.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
87-03-39472 Rev. 0	<b><i>Elementary and Secondary Education Act (ESEA) Title II Mathematics and Science</i></b> Maintains a record of federal dollar expenditures by grantees for a specific federal program (84.366).	<b>Retain</b> for 6 years after termination of contract <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
87-03-39471 Rev. 0	<b><i>Emergency Immigrant Education Assistance</i></b> Maintains a record of federal dollar expenditures by grantees for a specific federal programs (84.365).	<b>Retain</b> for 6 years after termination of contract <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-06-22696 Rev. 3	<b><i>Federal Grant Awards to the State Superintendent of Public Instruction</i></b> Maintains records of dollars secured from federal sources for Administrative Funds and Flow through funds paid to grantees.	<b>Retain</b> for 10 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-06-22709 Rev. 2	<b><i>Individuals with Disabilities Education Act (IDEA) Part B Section 611 Special Education</i></b> Maintains a record of federal dollar expenditures by grantees for a specific federal program (84.027).	<b>Retain</b> for 6 years after termination of contract <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 4.2 FEDERAL FINANCE – Office 460

*This office covers records related to federal funding.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-06-22708 Rev. 2	<b>Individuals with Disabilities Education Act (IDEA) Part B Section 619 Special Education Preschool</b> Maintains a record of federal dollar expenditures by grantees for a specific federal program (84.173).	<b>Retain</b> for 6 years after termination of contract <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-06-22707 Rev. 1	<b>Individuals with Disabilities Education Act (IDEA) Title IVC Deaf-Blind Projects</b> Maintains a record of federal dollar expenditure by grantee for a specific federal program (84.326).	<b>Retain</b> for 6 years after termination of contract <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-06-22697 Rev. 1	<b>Miscellaneous Federal Project Files</b> Maintains records of expenditures of federal dollars to grantees for programs under \$10,000, or short-term contracts.	<b>Retain</b> for 6 years after termination of contract <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-06-22698 Rev. 0	<b>School Districts' Civil Rights Compliance Under Public Law 88-352</b> Provides records of each school district's assurance of compliance to the Office of Civil Rights Act of 1964.	<b>Retain</b> for 75 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

#### **4.3 POLICY AND PARTNERSHIPS – Office 130**

*This office covers records related to governmental relations.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
97-09-58094 Rev. 0	<b><i>Final Documents for Operating and Supplemental Budgets</i></b> Contains information for operating and supplemental budget. Includes operating narrative, funding/comparisons, summaries.	<b>Retain</b> for 6 years after end of biennium <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

#### 4.4 SCHOOL APPORTIONMENT – Office 432

*This section covers records relating to the calculation and distribution of funding to school districts.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
12-09-68328 Rev. 0	<p><b>Apportionment Development Reports and Summaries – Levies, Personnel, and Student Enrollments</b></p> <p>Provides records of apportionment reports and summaries used to develop the final calculation and distribution of funding relating to levies, personnel and student enrollments.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Calculations of Levy Lid Authorities (F-780);</li> <li>• Student enrollment reporting (P223/P-223H);</li> <li>• Salaries and benefits paid to certificated and classified employees and report of certificated/classified employees – (1801 Cert Reports, 1801 Class Reports and Report S-275).</li> </ul>	<p><b>Retain</b> for 25 years after end of school year</p> <p><i>then</i></p> <p><b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OPR</p>

#### 4.4 SCHOOL APPORTIONMENT – Office 432

*This section covers records relating to the calculation and distribution of funding to school districts.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
12-09-68329 Rev. 1	<p><b>Apportionment Development Reports and Summaries – Other</b></p> <p>Provides records of other apportionment reports and summaries used to develop the final calculation and distribution of funding to school districts.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Surveys, notes, reports and working papers for monthly apportionments;</li> <li>• Non-high district pupil financial claims and enrollment reports (Form 483A, 483B, P-213);</li> <li>• Assessed valuations and tax rates (Report 1061);</li> <li>• Federal Forest Distribution Memos and Reports to County Treasurers;</li> <li>• Home and hospital reports (Form E-525);</li> <li>• Truancy petition filings (Forms 1302C and 1302D);</li> <li>• Hospital education program allotments;</li> <li>• Reports for instructional staffing (Forms 1158, 1230K-4);</li> <li>• Requests for salary bonus (Form 1525);</li> <li>• Staffing ratio enrollments (Forms 1159 and 1160);</li> <li>• State institutions allotments (Form 1191SI);</li> <li>• State institution enrollment reports (Form E 672);</li> <li>• Maintenance, construction and operations funds (Title 8 of the ESEA of 1965);</li> <li>• University of Washington Enrollment Reports;</li> <li>• Surveys, notes, reports and working papers for monthly enrollment;</li> <li>• Monthly apportionment reports.</li> </ul>	<p><b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR

#### 4.4 SCHOOL APPORTIONMENT – Office 432

*This section covers records relating to the calculation and distribution of funding to school districts.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
03-11-60584 Rev. 1	<b><i>Audit Adjustment Files</i></b> Provides records used to calculate adjustments to state funding. Includes, but is not limited to: <ul style="list-style-type: none"> <li>• Audit adjustments, corrections, and revised reports;</li> <li>• Correspondence and memos relating to adjustments.</li> </ul>	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
86-05-36559 Rev. 0	<b><i>Emergency Grants</i></b> Documentation pertaining to the adjustment of the allocation of funds in the event of an emergency.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
12-09-68330 Rev. 0	<b><i>Final Apportionment Reports</i></b> Provides records of apportionment reports and summaries that contain the final calculations and distribution of funding to school districts. Includes, but is not limited to: <ul style="list-style-type: none"> <li>• Summary of Full-time Equivalent (FTE) Enrollment (Report 1251);</li> <li>• Annual Apportionments of State Funds to School Districts Reports (BEA) and other funding streams;</li> <li>• Alternative Learning Experience Student Enrollment (ALE)</li> </ul>	<b>Retain</b> for 25 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR

#### 4.5 SCHOOL FACILITIES AND ORGANIZATION – Office 440

*This section covers records relating to school construction.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
04-07-60735 Rev. 0	<b><i>Asbestos Grant Applications</i></b> School district applications and award letters for Environmental Pollution Agency (EPA) funds to clean asbestos from school buildings. Certification records from school districts of meeting EPA non-asbestos requirements.	<b>Retain</b> for 50 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
97-10-58156 Rev. 0	<b><i>Educational Service District Acquisition and Alienation Files</i></b> Provides records of real property acquisition and alienations by Educational Service Districts (ESD).	<b>Retain</b> for 10 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
74-02-03424 Rev. 2	<b><i>Funding Backup Files</i></b> Maintains records of studies, planning grants, final drawings, forms, tables, priority ranking data, value engineering, constructability review and building commissioning, related reports and correspondence.	<b>Retain</b> for 12 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
97-10-58157 Rev. 0	<b><i>Participatory Finance Files</i></b> Provides a record of all capital fund aid agreements between non-highs and serving high school districts for secondary facilities.	<b>Retain</b> for 10 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

#### 4.5 SCHOOL FACILITIES AND ORGANIZATION – Office 440

*This section covers records relating to school construction.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
74-02-03419 Rev. 2	<b>Project Files</b> Maintains record of application of new facility and record of OSPI approval related allotment documents.	<b>Retain</b> for 50 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM
08-12-61941 Rev. 0	<b>Qualified Zone Academy Bonds (QZAB)</b> Provides a record of school district applications for QZAB's. Applications must include a description of what the money will be used for, and a guarantee of private company contributions of not less than 10% of the project cost.	<b>Retain</b> for 6 years after December 31 of issue year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
80-03-24354 Rev. 2	<b>School Building Specifications</b> Provides specifications and working drawings for building project.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
74-02-03422 Rev. 4	<b>School District Organization Files</b> Maintains record of OSPI action related to transfers of territory, consolidations, annexations, boundary corrections, dissolutions, and other related materials such as regional committee elections, changes in school district classification, and emerging high school districts.	<b>Retain</b> for 10 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR



#### 4.5 SCHOOL FACILITIES AND ORGANIZATION – Office 440

*This section covers records relating to school construction.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
94-02-52829 Rev. 3	<b><i>School District Study and Surveys</i></b> Long range facility and program plan. Renewable every six years.	<b>Retain</b> for 20 years after superseded <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM

#### 4.6 SCHOOL FINANCIAL SERVICES – Office 420

*This section covers records relating to school district budgeting, accounting, and financial reporting.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
80-09-26042 Rev. 2	<b><i>Annual Budget for Educational Service District F-206</i></b> Maintains original budgets for Educational Service Districts.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
80-09-26031 Rev. 1	<b><i>Annual Budgets for Public School Districts F-195</i></b> Provides documents necessary for approval of operating expenses for the fiscal school year. Last microfilm was for 2007-08 school year.	<b>Retain</b> for 25 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
80-09-26036 Rev. 1	<b><i>Annual Financial Statement for Public School Districts F-196</i></b> Maintains reports of actual revenues, expenditures, allocation of indirect costs, distribution of abatements, and net expenditure per pupil calculations. Last microfilm was for 2006-07 school year.	<b>Retain</b> for 25 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR

#### 4.6 SCHOOL FINANCIAL SERVICES – Office 420

*This section covers records relating to school district budgeting, accounting, and financial reporting.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
86-05-36558 Rev. 0	<b>Apportionment Redirection Requests and Approvals</b> Documentation pertaining to the redirection of general funds to school building funds.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
80-09-26032 Rev. 1	<b>Budget Revisions for Public Schools F-200</b> Maintains file for budget revisions for first-class districts and requests for budget extensions for second-class districts. (Filed as part of F-195). Last microfilm was for 2007-08 school year.	<b>Retain</b> for 25 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
80-09-26037 Rev. 3	<b>County Treasurer's Financial Report F-197</b> Maintains report of summary and status of local school district funds retained by county treasurer.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
91-02-47388 Rev. 4	<b>Educational Service District Year-End Report F-185</b> Maintains reports of actual revenues, expenditures, and financial position of ESD's federal expense funds.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR

#### 4.6 SCHOOL FINANCIAL SERVICES – Office 420

*This section covers records relating to school district budgeting, accounting, and financial reporting.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
86-05-47617 Rev. 0	<b><i>Investment Earnings on Advance of State Apportionment Funds – F-895</i></b> Statement from school districts reporting any interest earnings received from the investment of temporary cash surpluses resulting from the advance.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
08-12-61938 Rev. 0	<b><i>Maintenance of Effort Test</i></b> Special education, federal cross-cutting and vocational education. Provides historical information pertaining to school districts maintaining effort between current and prior year expenditures - 12/10/08.	<b>Retain</b> for 6 years after date of final test <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
11-06-62462 Rev. 1	<b><i>National Center for Educational Statistics (NCES) Financial</i></b> Final reporting and documentation pertaining to the annual financial reporting to the National Center for Educational Statistics.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
12-12-68354 Rev. 0	<b><i>National Education Association (NEA) Survey</i></b> Final reporting and documentation with school district and educational service district information provided to the National Education Association for publication of their annual survey.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM

#### 4.6 SCHOOL FINANCIAL SERVICES – Office 420

*This section covers records relating to school district budgeting, accounting, and financial reporting.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
80-09-26043 Rev. 1	<b><i>Request for Budget Extension for Educational Service Districts F-269</i></b> Maintains original files of request for budget revisions for Educational Service Districts.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
80-09-26044 Rev. 1	<b><i>School District and Educational Service Districts Financial Reporting Summary</i></b> Provides historical reports of financial expenditure of school districts.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
86-05-36560 Rev. 0	<b><i>Warrant Approvals</i></b> Requests from second class school districts to draw and issue own warrants.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
91-02-47392 Rev. 1	<b><i>Work Papers For Review Of Annual Financial Statement For Public School Districts</i></b> Documents the review of the F-196 reports by financial reports coordinator.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

#### **4.6 SCHOOL FINANCIAL SERVICES – Office 420**

*This section covers records relating to school district budgeting, accounting, and financial reporting.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
80-09-26033 Rev. 1	<b><i>Work Papers For Review Of School District Budgets And Budget Extensions</i></b> Maintains docs that assure completion of the budget and budget extension process by the school districts.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 5. INFORMATION TECHNOLOGY SERVICES

This section covers records relating to the management of technology and data reporting.

5.1 EDUCATIONAL TECHNOLOGY – Office 521			
<i>This section covers records related to the integration of technology into teaching and learning.</i>			
DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
89-06-44433 Rev. 1	<b>Educational Technology Project Files</b> Maintains information and reports necessary to provide technical assistance and staff training to school districts in the area of instructional technology including relative correspondence research material, hardware and software, publications, inventories, workshop presentations and materials.	<b>Retain</b> for 6 years after end of biennium <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
12-09-68331 Rev. 0	<b>E-RATE and Related Materials</b> Applications, forms, training materials, and correspondence related to the E-rate discount program administered by the Schools and Library Division (SLD) of the Universal Service Administrative Fund (USAC).	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 5.2 INFORMATION TECHNOLOGY SERVICES – Office 222

*This section covers records relating to data reporting.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
77-12-20255 Rev. 1	<b><i>Contracted Management Information Services, Studies, Surveys and Projects</i></b> Consist of contract management information projects including proposals, contract, correspondence and progress and final reports.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
77-12-20264 Rev. 2	<b><i>Education Information Advisory General Historical Files</i></b> Consists of EIAC files of historical significance on federal data collection.	<b>Retain</b> for 50 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
77-12-20268 Rev. 0	<b><i>School Information Files</i></b> Contains the administrator's name, school address, enrollment and other characteristics of Washington public and private schools.	<b>Retain</b> for 75 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM



## 5.2 INFORMATION TECHNOLOGY SERVICES – Office 222

*This section covers records relating to data reporting.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
86-07-37312 Rev. 0	<b><i>Special Studies Relative to Management of Information</i></b> Provides record of internal and external projects consisting of statistical data, federal, state or local surveys including copy of format and relative correspondence.	<b>Retain</b> for 3 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM

## 6. PROFESSIONAL CERTIFICATION – Office 210

This section covers records relating to educator certification.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
12-09-68332 Rev. 1	<p><b><i>Clock Hours</i></b> Records relating to programs for clock hours required towards certifications and continuing education. Includes, but is not limited to</p> <ul style="list-style-type: none"> <li>• Program approvals;</li> <li>• Program agenda, summary of evaluations;</li> <li>• Rosters/attendance /participant lists.</li> </ul>	<p><b>Retain</b> for 6 years after end of program <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM
12-09-68333 Rev. 1	<p><b><i>In-Service Provider Approvals</i></b> Records relating to the approvals and renewals of external providers for in-service clock hours. Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Applications;</li> <li>• Annual assurance of compliance forms;</li> <li>• Audit records;</li> <li>• Approved provider lists (list of agencies approved each year to offer clock hours).</li> </ul>	<p><b>Retain</b> for 6 years after end of program <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
76-12-17768 Rev. 3	<p><b>Professional Certification Credentials – Disciplinary/Revocation</b></p> <p>Records relating to any disciplinary actions, revocations or any suspensions of professional certification credentials.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Disciplinary and revocation documentation;</li> <li>• Court documents and other materials used in revoking specific individuals' credentials;</li> <li>• Revocation notifications (including from other states).</li> </ul>	<p><b>Retain</b> for 60 years after date of notification <i>or</i> 60 years after final order issued <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR
15-09-68822 Rev. 0	<p><b>Professional Certification Credentials – Issued</b></p> <p>Records relating to the issuing of professional certification credentials by the Office of the Superintendent of Public Instruction, including teachers, administrators, educational staff associates and vocational/career tech educators.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Certificate and number issued;</li> <li>• Probationary certificates.</li> </ul>	<p><b>Retain</b> for 60 years after expiration or renewal <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
15-09-68823 Rev. 0	<p><b>Professional Certification Credentials – Applications/Working Files</b></p> <p>Records relating to the applications and supporting documentation submitted by educators for professional certification credentials issued by the Office of the Superintendent of Public Instruction.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Applications;</li> <li>• Incomplete, unprocessed or disapproved applications;</li> <li>• Copies of transcripts, letters of verification and other background information;</li> <li>• Notices from other states of credentials.</li> </ul>	<p><b>Retain</b> for 7 years after issuance/denial of certificate</p> <p><i>then</i></p> <p><b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OPR</p>

## 7. SPECIAL PROGRAMS AND FEDERAL ACCOUNTABILITY

This section covers records relating to the management of Migrant and Bilingual Education, Special Education, Title I (LAP and Consolidated Program Review), Title II (Highly Qualified Teachers) and iGrants.

### 7.1 EQUITY AND CIVIL RIGHTS – Office 630

*This section covers records related to state and federal equity laws and monitoring.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
12-12-68357 Rev. 0	<b>Civil Rights Compliance Reviews</b> Documentation of actions taken by the Equity and Civil Rights Office regarding school district civil rights compliance reviews. Contains records such as letters, correspondence, information gathered from school district(s) and other sources, and other materials used in determining compliance. Reference 28A.640 RCW, 28A.642 RCW, 392-190 WAC. <i>Note: This series does not include civil rights monitoring through the Consolidated Program Review, which is covered under 7.5.</i>	<b>Retain</b> for 7 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
12-12-68356 Rev. 0	<b>School District Affirmative Action Plans</b> School district affirmative action plans submitted by each school district to be in compliance with state laws. Reference 28A.640 RCW, 28A.642 RCW, WAC 392-190-0592.	<b>Retain</b> until superseded <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 7.1 EQUITY AND CIVIL RIGHTS – Office 630

*This section covers records related to state and federal equity laws and monitoring.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
12-12-68355 Rev. 0	<p><b><i>School District Monitoring Reports</i></b></p> <p>Documentation on routine monitoring of school districts for compliance with state and federal civil rights laws and regulations, including school district reports and assurances of compliance, school district athletic interest surveys, school district athletic evaluations, and school district worksheets and forms. Reference 28A.640 RCW, 28A.642 RCW, 392-190 WAC.</p> <p><i>Note: This series does not include civil rights monitoring through the Consolidated Program Review, which is covered under 7.5.</i></p>	<p><b>Retain</b> for 5 years after end of school year <i>then</i> <b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OFM</p>

## 7.2 MIGRANT AND BILINGUAL EDUCATION – Office 613

*This section covers records related to migrant and bilingual education.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
88-07-42556 Rev. 1	<b>Chapter 1 Migrant Education Files</b> Maintains records of allocation of funds and monitoring of federal programs. Includes multiple form numbers.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
79-06-22750 Rev. 3	<b>Federal Title VII and State Transitional Bilingual Ed. and Immigrant Ed. Program Files</b> Program files include documents such as program application, monitoring reports, end-of-year reports, and correspondence relating to the bilingual program.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
91-09-48191 Rev. 0	<b>Historical Information</b> State plans, evaluation reports, and state advisory committee files.	<b>Retain</b> for 25 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR

## 7.2 MIGRANT AND BILINGUAL EDUCATION – Office 613

*This section covers records related to migrant and bilingual education.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
88-07-42560 Rev. 1	<b><i>Immigration Education Program Files</i></b> Maintains records of the allocation of federal funds and monitoring process for public and nonpublic schools. Includes forms 1063, SS-256, F-1000B. Relative correspondence.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM
88-07-42561 Rev. 0	<b><i>School Retention and Retrieval Program</i></b> Maintains records of program to allocate start-up funds to certain school districts to assist in the development of student motivation, retention and retrieval programs for youths who are at risk of dropping out of school or who have dropped out of school.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM



### 7.3 SPECIAL EDUCATION – Office 710

*This section covers records related to special education and related services.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-07-22982 Rev. 1	<b><i>Education of the Handicapped, Title VI, Part B Files</i></b> Provides record of school district applications, grant awards, correspondence, final reports and evaluations. Including preschool incentive program and extended school year programs.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-07-22985 Rev. 1	<b><i>Education of the Handicapped, Title VI, Part C Files</i></b> Provides record of school district applications, grant reports and evaluations for deaf, blind and preschool handicapped.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.	<b>ARCHIVAL</b> <b>(Appraisal Required)</b> NON-ESSENTIAL OPR
79-07-22984 Rev. 1	<b><i>Education of the Handicapped, Title VI, Part D Files</i></b> Provides record of school district applications, grant awards, correspondence, final reports.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-07-22983 Rev. 0	<b><i>Institutional Education Program Files</i></b> Provides record of institution and school district applications for funds, related correspondence, grant awards, final reports, evaluations under Public Law 89-313 and 89-750.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

### 7.3 SPECIAL EDUCATION – Office 710

*This section covers records related to special education and related services.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-07-22987 Rev. 2	<b><i>Special Education Advisory Council Files</i></b> Provides record of Special Education Council subcommittees and task force membership lists, agendas, minutes, correspondence, and reports.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
97-05-57719 Rev. 0	<b><i>Special Education Citizen Complaint File</i></b> Contains records such as letters composed by the Special Education office, letters from complainant(s), school district involved and information gathered from other sources for the purpose of resolving the complaint.	<b>Retain</b> for 7 years after resolution of complaint <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
83-01-31079 Rev. 0	<b><i>Special Education Citizens Complaints/Hearings</i></b> Provides documentation of actions taken by the Special Education Office regarding special education complaints/hearings related to placement or program provided to special education students.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM

### 7.3 SPECIAL EDUCATION – Office 710

*This section covers records related to special education and related services.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-07-22988 Rev. 1	<b><i>Special Education Committee and Meeting Files</i></b> Maintains committee work files, related correspondence expense authorization, status reports.	<b>Retain</b> for 2 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM
96-11-57306 Rev. 2	<b><i>Special Education Compliance Verification</i></b> Documentation on school districts monitored for Special Education Compliance. Records include letters, monitoring reports, forms, and materials used in determining compliance.	<b>Retain</b> for 21 years after end of cycle <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
03-03-60495 Rev. 0	<b><i>Special Education Non-Public Agency Files</i></b> Inactive files regarding Non-Public Agencies (NPA) previously contracted with Washington State public schools to provide special education services to students with disabilities.	<b>Retain</b> for 7 years after non-public agency no longer certified <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

### 7.3 SPECIAL EDUCATION – Office 710

*This section covers records related to special education and related services.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-07-22989 Rev. 0	<b><i>Special Education Report</i></b> Provides record of interagency and intraagency reports and surveys pertaining to special and institutional education.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM
03-11-60583 Rev. 1	<b><i>Special Education Safety Net Applications Notes and Working Papers</i></b> Provides documentation of requests for funding of special education programs, related correspondence, and notes and working papers supporting award decisions by the State Oversight Committee of state and federal special education funding.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-07-22981 Rev. 0	<b><i>Special Education School District Excess Cost Files</i></b> Maintains requests for funding of special education programs and related correspondence.	<b>Retain</b> for 3 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 7.4 SPECIAL PROGRAMS AND FEDERAL ACCOUNTABILITY – Office 766

*This section covers records related to state and federally funded projects.*

ION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
84-02-34803 Rev. 1	<b><i>State and Federally Funded Projects Evaluations – Final</i></b> Provides record of final annual program evaluation reports for the following programs: Chapter 1 - Regular, Chapter 1 - Migrant, Chapter 1 - N&D, Learning Assistance Program, Chapter 2 - Bilingual and Education Clinics.	<b>Retain</b> for 7 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
94-02-52822 Rev. 1	<b><i>State and Federally Funded Projects Working Files</i></b> Provides documentation of the preliminary work and collection of evaluations and studies used in the development of the final annual evaluation reports. Includes, but is not limited to: <ul style="list-style-type: none"> <li>Confidential student level Chapter 1, Learning Assistance Program and Education Clinic evaluations.</li> </ul>	<b>Retain</b> for 5 years after final report submitted <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 7.5 TITLE I, LEARNING ASSISTANCE PROGRAM (LAP), and CONSOLIDATED PROGRAM REVIEW (CPR) – Office 520

*This section covers records related to the Title I, Learning Assistance Program (LAP), and Consolidated Program Review (CPR).*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-06-22746 Rev. 0	<b>Centrum Project Files</b> Maintains applications, grant awards, budgets, selected correspondence and reports for experience in creativity workshops.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
92-10-51384 Rev. 2	<b>Elementary and Secondary Education Act (ESEA) Title V Correspondence Files</b> Informational correspondence relating to the Title V program.	<b>Retain</b> for 2 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
92-10-51383 Rev. 2	<b>Elementary and Secondary Education Act (ESEA) Title V Project Files</b> Maintains records of allocation of funds and monitoring of federal programs.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-06-22747 Rev. 0	<b>Gifted Advisory Council Files</b> Maintains membership lists, agendas, minutes, correspondence and reports.	<b>Retain</b> for 3 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM

## 7.5 TITLE I, LEARNING ASSISTANCE PROGRAM (LAP), and CONSOLIDATED PROGRAM REVIEW (CPR) – Office 520

*This section covers records related to the Title I, Learning Assistance Program (LAP), and Consolidated Program Review (CPR).*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-06-22748 Rev. 0	<b><i>Gifted Federal Programs Project Files</i></b> Maintains applications, grant awards, evaluations, reports, contracts and correspondence for federal gifted programs in school districts.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-06-22744 Rev. 0	<b><i>Informational Reports and Statistical Data</i></b> Maintains copy of state board reports, annual data reports, legislative reports, copies of speeches and data processing printouts.	<b>Retain</b> for 3 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM
00-10-59933 Rev. 0	<b><i>Learn and Serve America Correspondence Files</i></b> Informational correspondence relating to Learn and Serve program.	<b>Retain</b> for 3 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
00-10-59932 Rev. 0	<b><i>Learn and Serve America Project Files</i></b> Maintain records of federal grant and subgrantees and monitoring of federal programs.	<b>Retain</b> for 6 years after termination of grant <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 7.5 TITLE I, LEARNING ASSISTANCE PROGRAM (LAP), and CONSOLIDATED PROGRAM REVIEW (CPR) – Office 520

*This section covers records related to the Title I, Learning Assistance Program (LAP), and Consolidated Program Review (CPR).*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
92-10-51385 Rev. 0	<b>Practitioner Committee Workshop Files</b> Maintains records of application/allocation/reimbursement.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-06-22745 Rev. 0	<b>Project Files</b> Maintains grant applications, and awards, budgets, selected correspondence and monitoring reports for state gifted programs in school districts.	<b>Retain</b> for 7 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
86-08-37399 Rev. 0	<b>Remediation Assistance Project Files</b> Provides for allocation and monitoring of Remediation Assistance Funds. Includes, applications, grant awards, review checklists and evaluations.	<b>Retain</b> for 5 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM



## 8. STUDENT SUPPORT

This section covers records relating to Private Education, Child Nutrition Services, Learning and Teaching Support, School Safety Center, Student Transportation, and the Office of Professional Practices.

<b>8.1 21<sup>ST</sup> CENTURY LEARNING – Office 764</b> <i>This section covers records related to the 21<sup>st</sup> Century Learning Centers program.</i>			
DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
97-09-58091 Rev. 0	<b><i>Schools for the 21st Century</i></b> Maintains a record of the schools/districts participating in the Schools for the 21st Century program. Includes applications and documentation submitted by the schools for funding.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 8.2 ADMINISTRATIVE RESOURCE SERVICES – Office 160

*This section covers records related to the activities of providing administrative and legal services, including election administration.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-05-22536 Rev. 3	<p><b>Appeal Case Files</b></p> <p>Records relating to the appeals of actions taken by Office of the Superintendent of Public Instruction regarding, student transfers, special education student placements, bus drivers, and equal education.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Case file of appeal;</li> <li>• Final decisions.</li> </ul> <p>Excludes teacher discipline cases covered by Professional Practices Disciplinary and Investigative Files (DAN 92-04-50255).</p>	<p><b>Retain</b> for 10 years after final decision <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR
14-09-68527 Rev. 0	<p><b>Board Elections – Administration</b></p> <p>Records relating to the internal administration of the elections of board members serving on the State Board of Education and the Educational Services District Board by Office of the Superintendent of Public Instruction.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Eligibility;</li> <li>• Ballots and tally sheets;</li> <li>• Working files.</li> </ul> <p>Excludes:</p> <ul style="list-style-type: none"> <li>• Election results and challenges to eligibility or results covered by Board Appointments and Elections – Results (DAN 81-04-27483);</li> <li>• Records relating to the administration of elections held by School Districts to serve on local district school boards.</li> </ul>	<p><b>Retain</b> for 1 year after certification of election <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 8.2 ADMINISTRATIVE RESOURCE SERVICES – Office 160

*This section covers records related to the activities of providing administrative and legal services, including election administration.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
81-04-27483 Rev. 2	<p><b>Board Appointments and Elections – Results</b></p> <p>Records relating to the elections results and/or appointment of board members serving on the State Board of Education and the Educational Services District Board administered by Office of the Superintendent of Public Instruction.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Election results;</li> <li>• Challenges (to either candidate’s eligibility or election results);</li> <li>• Oaths of office.</li> </ul> <p>Excludes elections results held by School Districts to serve on local district school boards.</p>	<p><b>Retain</b> for 6 years after next election <i>then</i> <b>Transfer</b> to Washington State Archives for appraisal and selective retention.</p>	<p><b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM</p>

### 8.3 CHILD NUTRITION SERVICES – Office 433

*This section covers records relating to assisting school districts and other program sponsors to provide quality nutrition programs.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
13-09-68460 Rev. 0	<p><b>Food and Nutrition Programs</b></p> <p>Records relating to food and nutrition programs providing assistance and support for quality nutrition supplied through the school districts or other associated providers.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Sponsor information and files;</li> <li>• Reimbursements and claims;</li> <li>• Audit batches and reporting.</li> </ul> <p>Programs include, but are not limited to:</p> <ul style="list-style-type: none"> <li>• Child and Adult Care Food Program (CACFP)</li> <li>• Food Distribution Program (FDP)</li> <li>• Fresh Fruit and Vegetable Program (FFVP)</li> <li>• National School Lunch Program (NSLP)</li> <li>• School Breakfast Program (SBP)</li> <li>• Seamless Summer Feeding Program (SP)</li> <li>• Special Milk Program (SMP)</li> <li>• Summer Food Service Program (SFSP)</li> </ul> <p>Excludes:</p> <ul style="list-style-type: none"> <li>• Contracts and agreements for services provided covered by Contracts and Agreements (DAN GS 01050);</li> <li>• Provider files.</li> </ul>	<p><b>Retain</b> for 6 years after end of fiscal year</p> <p><i>then</i></p> <p><b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OPR</p>

### 8.3 CHILD NUTRITION SERVICES – Office 433

*This section covers records relating to assisting school districts and other program sponsors to provide quality nutrition programs.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
74-06-05321 Rev. 2	<p><b>Food Distribution – USDA Foods Files</b></p> <p>Records relating to commodities offered, accepted and distributed to school food authorities.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Inventories and warehousing;</li> <li>• Freight and shipping;</li> <li>• Transfers/damages;</li> <li>• Schedules.</li> </ul>	<p><b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR
13-09-68462 Rev. 0	<p><b>Program Deficiency – Temporarily Deferred Providers</b></p> <p>Documentation from sponsors that participate on Child and Adult Care Food Program (CACFP) to providers regarding program deficiencies and providers that have been deferred.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Notification of deficiencies;</li> <li>• Corrective action plans;</li> <li>• Notices of temporary deferral.</li> </ul>	<p><b>Retain</b> for 3 years from temporary deferral date <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM

### 8.3 CHILD NUTRITION SERVICES – Office 433

*This section covers records relating to assisting school districts and other program sponsors to provide quality nutrition programs.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
13-09-68461 Rev. 0	<p><b>Program Deficiency – Terminated Providers</b></p> <p>Documentation from sponsors that participate in Child and Adult Care Food Program (CACFP) regarding program deficiencies and terminated providers.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Notification of deficiencies;</li> <li>• Corrective action plans;</li> <li>• USDA reporting form for placement on the National Disqualified List.</li> </ul>	<p><b>Retain</b> for 7 years from program termination date <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM
13-09-68463 Rev. 0	<p><b>Reporting – Food and Nutrition Programs</b></p> <p>Records relating to the reporting requirements by the federal government in support of the food and nutrition programs, such as entitlement monies and distribution of funds and reporting state inventories.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• U. S. Department of Agriculture financial reports (FNS 418, FNS 10, FNS 44);</li> <li>• School lunch quarterly financial reports;</li> <li>• State inventories.</li> </ul>	<p><b>Retain</b> for 3 years after end of federal fiscal year <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR
74-08-05332 Rev. 1	<p><b>School District Visitation</b></p> <p>Provides a record of all reports for school district visitations made by representatives of this section. These visits are made by federal requirement to ascertain that school districts are meeting all regulations governing the Child Nutrition Program.</p>	<p><b>Retain</b> for 10 years after end of federal fiscal year <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OFM

### 8.3 CHILD NUTRITION SERVICES – Office 433

*This section covers records relating to assisting school districts and other program sponsors to provide quality nutrition programs.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
74-06-05315 Rev. 0	<b><i>State/School District Food Service Program Agreement</i></b> Contract between state agency and school district for operation of food service programs, Form M-280.	<b>Retain</b> for 10 years after end of federal fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

#### 8.4 EARLY CHILDHOOD/CHILD CARE PROGRAMS – Office 591

*This section covers records related to early childhood and child care programs.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
91-10-49235 Rev. 0	<b><i>Preschool Accreditation Files</i></b> Maintain records of applications and accompanying documentation for preschool accreditation.	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
91-10-49236 Rev. 0	<b><i>School-Age Child Care Files</i></b> Maintain records of allocation of funds and monitoring of state grants. Includes form SPI F-425 and form SPI 1209.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR



## 8.5 OFFICE OF PROFESSIONAL PRACTICES – Office 190/191

*This section covers records related to background records checks, unprofessional conduct investigations, and administrative resources.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
94-08-54642 Rev. 4	<p><b>Fingerprint Files</b></p> <p>Records relating to compliance with Washington State law (RCW 28A3.400.303 and RCW 28A.195.080) require new employees of a school district, an educational service district (ESD), charter schools and/or approved private schools with regularly unsupervised access to children be fingerprinted for a record check through the Washington State Patrol (WSP) and the Federal Bureau of Investigation (FBI). Washington State law (RCW 28A.410.010) also requires applicants who do not possess a valid Washington teaching certificate at the time of application be fingerprinted for a background record check through the WSP and the FBI.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Fingerprint cards received/scanned/transmitted by OSPI to the WSP for processing;</li> <li>• Incomplete or pending checks;</li> <li>• Background checks and Electronic Applicant Submission Forms;</li> <li>• Clearance letters.</li> </ul> <p><i>Note: Retains fingerprint data in an electronic database. The records are purged from the system 24 months from the date FBI results are received or 24 months from the date Washington State Patrol results are received if the FBI results have not received.</i></p>	<p><b>Retain</b> for 2 years after cleared with FBI <i>and</i> record check verified by OSPI <i>then</i> <b>Destroy.</b></p>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 8.5 OFFICE OF PROFESSIONAL PRACTICES – Office 190/191

*This section covers records related to background records checks, unprofessional conduct investigations, and administrative resources.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
92-04-50255 Rev. 2	<p><b>Professional Practices Disciplinary and Investigative Files</b></p> <p>Records relating to Individual case files for unprofessional conduct complaints and investigations which have been upheld and disciplinary actions taken. Includes notifications both in state and out of state of all certificates to all private and public school officials that have been suspended, surrendered, revoked or denied as required by WAC 181-86-185.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>Complaints and entire investigative files;</li> <li>Applicant investigative files;</li> <li>Cases not opened or dismissed.</li> </ul>	<p><b>Retain</b> for 52 years after case closed <i>and</i> notifications completed <i>then</i> <b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OPR</p>

## 8.6 PRIVATE EDUCATION – Office 560

*This section covers records related to the approval of private schools.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-06-22651 Rev. 1	<b><i>Certificated Personnel Records by Private School (S-472 Data)</i></b> Lists indicating validity of private school teachers/certificate numbers.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-03-22042 Rev. 1	<b><i>Certificated Personnel Report for Private Schools (S-472)</i></b> Provides collection of certificated personnel data for private schools.	<b>Retain</b> for 1 year after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
91-10-49230 Rev. 1	<b><i>Home-Based Instruction Annual Enrollment Reports</i></b> Collected home-based instruction enrollment counts from Local Education Agency.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
79-06-22654 Rev. 2	<b><i>Inactive Private School Files</i></b> Files of private school that have closed or failed to start as scheduled.	<b>Retain</b> for 6 years after closure of school <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM

## 8.6 PRIVATE EDUCATION – Office 560

*This section covers records related to the approval of private schools.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
79-06-22650 Rev. 2	<b><i>Individual Private School Approval Files</i></b> Contains initial application, annual Certificate of Compliance State Standards and correspondence.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR

## 8.7 STUDENT TRANSPORTATION – Office 470

*This section covers records related to student transportation.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
86-06-37079 Rev. 0	<b>Annual School Bus Mileage Report Form 1021</b> Provides report of miles driven. Input to report for Office of Financial Management.	<b>Retain</b> for 2 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
86-06-37089 Rev. 1	<b>Application for School Bus Driver's Authorization</b> Provides info required for issuance of a school bus driver's authorization.	<b>Retain</b> for 2 years from expiration date <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-06-22680 Rev. 0	<b>Application for School Bus Driver's Certificate M-645A</b> Provides information required for issuance of a school bus driver's certificate.	<b>Retain</b> for 4 years from termination of employment <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
86-06-37087 Rev. 1	<b>Initial School Bus Inspection</b> Document initial inspection of bus on entry into this state. Enter onto allocation systems.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 8.7 STUDENT TRANSPORTATION – Office 470

*This section covers records related to student transportation.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
86-06-37082 Rev. 1	<b><i>Inventory Depreciation and Replacement Allocation Report Form 1024</i></b> Develops annual and accumulated school bus depreciation.	<b>Retain</b> for 20 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
86-06-37086 Rev. 1	<b><i>Routine School Bus Inspection</i></b> Document required annual inspection of all school buses.	<b>Retain</b> for 1 year after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-06-22665 Rev. 1	<b><i>School Bus Acquisition and Disposition Form 1020</i></b> Provides documentation pertaining to size, make, serial number and cost of school buses purchased or sold.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
91-02-47393 Rev. 0	<b><i>School Bus Driver Status Report</i></b> Lists the current status of all active drivers for each district.	<b>Retain</b> for 18 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 8.7 STUDENT TRANSPORTATION – Office 470

*This section covers records related to student transportation.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
86-06-37091 Rev. 1	<b>School Bus Operation Permit</b> Provides school districts with permit to license and operate school buses. Permit is specific to individual buses.	<b>Retain</b> for 20 years from issue date <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-06-22688 Rev. 0	<b>School Bus Operation Permit SF4968</b> Provides school districts with permit to license and operate school busses.	<b>Retain</b> for 7 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
86-06-37080 Rev. 0	<b>School Bus Route Logs – Form 1022A-1</b> Documents transportation data for annual report used in calculation of transportation operating allocation.	<b>Retain</b> for 2 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
79-03-22049 Rev. 1	<b>Transportation Adjustment</b> Adjustments from estimated reimbursement to actual annual reimbursement.	<b>Retain</b> for 3 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 8.7 STUDENT TRANSPORTATION – Office 470

*This section covers records related to student transportation.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
86-06-37081 Rev. 0	<b>Transportation Vehicle Fund Expenditure Approval – Form 1023</b> Provides major bus repair information for approval of expenditures.	<b>Retain</b> for 2 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM



## 8.8 SUBSTANCE ABUSE – Office 523

*This section covers records related to the School Safety Center.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
12-09-68335 Rev. 0	<b><i>Student Assistance Prevention and Intervention Services Program Evaluation Reports</i></b> Student Assistance Prevention and Intervention Services Program Data is collected each school year, and compiled into an evaluation report for the program. This is used for reporting purposes.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
05-04-60854 Rev. 0	<b><i>Washington State Survey of Adolescent Health Behaviors</i></b> Material pertaining to the WA State Survey of Adolescent Health Behaviors, statewide survey assessing the attitudes and behaviors of WA public school students.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM

## 8.9 TRAFFIC SAFETY – Office 580

*This section covers records related to school Traffic Safety Education programs.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
74-03-03680 Rev. 1	<b><i>Application for Traffic Safety Education Program (M363, M364, M365, M365B)</i></b> Approval for traffic safety education programs for public, private, parochial and commercial schools.	<b>Retain</b> for 7 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
74-03-03687 Rev. 0	<b><i>Class Attendance for School Bus Drivers</i></b> Verification of courses and license check.	<b>Retain</b> for 7 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
75-03-09617 Rev. 0	<b><i>Pupil Transportation Reimbursement Forms</i></b> Establishes reimbursement amount.	<b>Retain</b> for 7 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
75-03-09616 Rev. 0	<b><i>School Bus Records</i></b> Series of files by school districts that includes purchasing information, inspection reports, operating permits and general correspondence. School bus depreciation forms also included.	<b>Retain</b> for 7 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 8.9 TRAFFIC SAFETY – Office 580

*This section covers records related to school Traffic Safety Education programs.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
74-03-03681 Rev. 1	<b><i>Traffic Safety Education Certificate (TSE 15)</i></b> Enables student to be licensed and insured prior to age 18.	<b>Retain</b> for 7 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
74-03-03683 Rev. 0	<b><i>Traffic Safety Education Instructor Information (Revision S-110)</i></b> Office information and to check reimbursement claim.	<b>Retain</b> for 3 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
91-09-48101 Rev. 1	<b><i>Traffic Safety Education Request for Forms – Form SPI 3009</i></b> Traffic Safety Education request for validation stickers.	<b>Retain</b> for 1 year after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM

## 9. TEACHING AND LEARNING

This section covers records relating to the development, review, and revision of all of Washington's K-12 learning standards.

### 9.1 ARTS EDUCATION – Office 512

*This section covers records related to Arts education.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
91-12-49499 Rev. 0	<b>Art Sense</b> Provides documentation on operation of Art Sense Program that displays K-12 art works each month in the Executive Board Room.	<b>Retain</b> for 2 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
91-12-49495 Rev. 0	<b>Special Projects</b> Provides documentation pertaining to the carrying out of special projects assigned to the State Supervisor of Visual and Performing Arts.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR
91-12-49497 Rev. 1	<b>Superintendent of Public Instruction's Annual High School Art Show</b> Materials relating to the organization and presentation of the High School Art Show which include announcements, rules, judging, winners, etc.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR

## 9.1 ARTS EDUCATION – Office 512

*This section covers records related to Arts education.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
91-12-49498 Rev. 0	<b><i>Training/Workshops/Forums</i></b> Provides information pertaining to workshops and public forums sponsored by the curriculum program. Includes information on speakers, attendance, handouts, clock hour information, etc.	<b>Retain</b> for 2 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 9.2 HEALTH/FITNESS EDUCATION AND HIV/AIDS PREVENTION – Office 593

*This section covers records related to health and fitness programs.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
91-10-49241 Rev. 0	<b><i>HIV/AIDS Education Files</i></b> Maintain records of applications, teacher trainings, workshops, conferences and accompanying documentation.	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR
91-10-49242 Rev. 1	<b><i>Program Files</i></b> Maintain records of allocation of funds and monitoring of both state and federal grants, and personal services contracts and related correspondence.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

### 9.3 MATHEMATICS – T&L – Office 765

*This section covers records related to teaching and learning for mathematics.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
01-06-60098 Rev. 0	<b><i>Mathematics Helping Corps Program Files</i></b> Program files relating to the Mathematics Helping Corps program, i.e., RFPs, legislative reports, correspondence, travel records, training courses, contracts, etc.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OPR

## 9.4 SOCIAL STUDIES – Office 522

*This section covers records related to teaching and learning for social studies.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
04-07-60737 Rev. 0	<b>Classroom Based Assessment Student Responses</b> Student response packets on classroom based assessments.	<b>Retain</b> for 2 years after end of calendar year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
12-09-68326 Rev. 0	<b>Student Awards Program</b> To acknowledge and award outstanding students statewide. Retain applications of recipients, score results, publications, and administrative information on the selection process and award program. Includes but not limited to Daniel J. Evans Civic Education Award, Washington State Legislative Youth Advisory Council (LYAC), Escribo En Español Contest.	<b>Retain</b> for 6 years after end of calendar year <i>then</i> <b>Transfer</b> to Washington State Archives permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM
91-09-48113 Rev. 0	<b>Substitute Teacher Reimbursement</b> Retain official records of teachers serving on Social Studies meetings/committee for which a substitute teacher is needed by the school district.	<b>Retain</b> for 2 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
91-02-47384 Rev. 1	<b>Teacher Exchange Program Files</b> Program files relating to Washington teacher exchange programs. Announcement, application, correspondence, etc.	<b>Retain</b> for 6 years after end of fiscal year <i>then</i> <b>Transfer</b> to Washington State Archives permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR



## 9.4 SOCIAL STUDIES – Office 522

*This section covers records related to teaching and learning for social studies.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
91-09-48109 Rev. 1	<b><i>U.S. Senate Youth Program</i></b> Two students from Washington State are selected to travel to Washington, D. C. for on-site study of the federal government. Retain record of applications, procedures and administrative information.	<b>Retain</b> for 2 years after end of school year <i>then</i> <b>Destroy.</b>	NON-ARCHIVAL NON-ESSENTIAL OFM
91-09-48108 Rev. 1	<b><i>Washington National History Day</i></b> Statewide competition for junior/senior high school students in the writing of historical papers in which winners advance to a national competition. Retain records of interagency agreements with contest sponsors, competition packets and correspondence.	<b>Retain</b> for 6 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.	<b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM

## 9.5 TEACHING AND LEARNING – Office 740

*This section covers records related to the development of learning standards.*

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
91-02-47382 Rev. 1	<p><b>Curriculum Guidelines and Publications</b></p> <p>Materials relating to curriculum guidelines and publications for all programs. May include originals, drafts and working papers used to compose curriculum guidelines and publications.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Arts and Languages;</li> <li>• Health and Fitness;</li> <li>• Sciences and Mathematics;</li> <li>• Social and Civic Studies.</li> </ul>	<p><b>Retain</b> for 2 years after publication date <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.</p>	<p><b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OPR</p>
97-09-58092 Rev. 0	<p><b>Environmental Education</b></p> <p>Maintains a record of the schools/districts participating in the Environmental Education and program. Includes applications documentation submitted by the schools for funding.</p>	<p><b>Retain</b> for 6 years after end of school year <i>then</i> <b>Destroy.</b></p>	<p>NON-ARCHIVAL NON-ESSENTIAL OPR</p>
12-09-68325 Rev. 0	<p><b>Instructional Materials Review (Curriculum)</b></p> <p>Materials collected for review in comparison to state K-12 education standards. These include item writing material, data review material, content review material, bias and sensitivity review, and statistical information.</p>	<p><b>Retain</b> for 5 years after end of school year <i>then</i> <b>Transfer</b> to Washington State Archives for permanent retention.</p>	<p><b>ARCHIVAL</b> (Permanent Retention) NON-ESSENTIAL OFM</p>

## GLOSSARY

### ***Appraisal***

The process of determining the value and disposition of records based on their current administrative, legal, and fiscal use; their evidential and informational or research value; and their relationship to other records.

### ***Archival (Appraisal Required)***

Public records which may possess enduring legal and/or historic value and must be appraised by the Washington State Archives on an individual basis.

*Public records will be evaluated, sampled, and weeded according to archival principles by archivists from Washington State Archives (WSA). Records not selected for retention by WSA may be disposed of after appraisal.*

### ***Archival (Permanent Retention)***

Public records which possess enduring legal and/or historic value and must not be destroyed. State government agencies must transfer these records to Washington State Archives (WSA) at the end of the minimum retention period.

*WSA will not sample, weed, or otherwise dispose of records fitting the records series description designated as “Archival (Permanent Retention)” other than the removal of duplicates.*

### ***Disposition***

Actions taken with records when they are no longer required to be retained by the agency.

*Possible disposition actions include transfer to Washington State Archives and destruction.*

### ***Disposition Authority Number (DAN)***

Control numbers systematically assigned to records series or records retention schedules when they are approved by the State Records Committee.

### **Essential Records**

Public records that state government agencies must have in order to maintain or resume business continuity following a disaster. While the retention requirements for essential records may range from very short-term to archival, these records are necessary for an agency to resume its core functions following a disaster.

*Security backups of these public records should be created and may be deposited with Washington State Archives in accordance with Chapter 40.10 RCW.*

### **Federal Fiscal Year**

The federal fiscal year runs from October to September the following year.

### **Non-Archival**

Public records which do not possess sufficient historic value to be designated as “Archival”. Agencies must retain these records for the minimum retention period specified by the appropriate, current records retention schedule.

*Agencies should destroy these records after their minimum retention period expires, provided that the records are not required for litigation, public records requests, or other purposes required by law.*

### **Non-Essential Records**

Public records which are not required in order for an agency to resume its core functions following a disaster, as described in Chapter 40.10 RCW.

### **OFM (Office Files and Memoranda)**

Public records which have been designated as “Office Files and Memoranda” for the purposes of RCW 40.14.010.

*RCW 40.14.010 – Definition and classification of public records.*

*(2) “Office files and memoranda include such records as correspondence, exhibits, drawings, maps, completed forms, or documents not above defined and classified as official public records; duplicate copies of official public records filed with any agency of the state of Washington; documents and reports made for the internal administration of the office to which they pertain but not required by law to be filed or kept with such agency; and other documents or records as determined by the records committee to be office files and memoranda.”*

### **OPR (Official Public Records)**

Public records which have been designated as “Official Public Records” for the purposes of RCW 40.14.010.

*RCW 40.14.010 – Definition and classification of public records.*

*(1) "Official public records shall include all original vouchers, receipts, and other documents necessary to isolate and prove the validity of every transaction relating to the receipt, use, and disposition of all public property and public income from all sources whatsoever; all agreements and contracts to which the state of Washington or any agency thereof may be a party; all fidelity, surety, and performance bonds; all claims filed against the state of Washington or any agency thereof; all records or documents required by law to be filed with or kept by any agency of the state of Washington; ... and all other documents or records determined by the records committee... to be official public records."*

### **Public Records**

**RCW 40.14.010 – Definition and classification of public records.**

*"... The term "public records" shall include any paper, correspondence, completed form, bound record book, photograph, film, sound recording, map drawing, machine-readable material, compact disc meeting current industry ISO specifications, or other document, regardless of physical form or characteristics, and including such copies thereof, that have been made by or received by any agency of the state of Washington in connection with the transaction of public business..."*

### **Records Series**

**A group of records, performing a specific function, which is used as a unit, filed as a unit, and may be transferred or destroyed as a unit. A records series may consist of a single type of form or a number of different types of documents that are filed together to document a specific function.**

### **State Records Committee**

**The committee established by RCW 40.14.050 to review and approve disposition of state government records.**

*Its four members include the State Archivist and one representative each from the Office of the Attorney General, Office of the State Auditor, and the Office of Financial Management.*

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